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ABSTRACT

The United States Employment Service (USES) Specific Aptitude Test Battery (SATB) for Customer-Service Representative is evaluated from three points of view: (1) technical adequacy of the research; (2) fairness to minorities; and (3) usefulness of the battery to Employment Service staff and employers in selecting individuals for training in Customer-Service Representative positions. Research demonstrated a statistically significant and useful relationship between proficiency as a Customer-Service Representative and the SATB. The SATB can be expected to produce a useful increase in the proportion of highly proficient workers. When the SATB was applied to the validation sample, composed of individuals who were employed and therefore considered competent, an increase from 67 percent to 75 percent in the proportion of highly proficient workers was found. A greater increase can be expected when the battery is used with applicants, because the range of relevant abilities is wider among applicants than among employed workers. The report includes: (1) research summary; (2) procedure; (3) analysis; and (4) validity of the battery. Descriptive statistics for subgroups of the validation sample, descriptive rating scale, and job description are contained in the appendices. (Author/PN)

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Customer-Service Representative (light, heat, & power; tel. & tel.; waterwork) 239.367-010

Development of USES Specific Aptitude Test Battery S-474R82

ED223696

U.S. Department of Labor
Employment and Training Administration
U.S. Employment Service
1982

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TM 820 893

DEVELOPMENT OF USES SPECIFIC APTITUDE TEST BATTERY

for

CUSTOMER-SERVICE REPRESENTATIVE (light, heat, & power; tel. & tel.; waterworks) 239.367-010

S-474R82

Developed in cooperation with the Alabama, Arkansas, District of Columbia, Indiana, Kentucky, Massachusetts, Michigan, Minnesota, New Mexico, New York, Oklahoma, Oregon, Pennsylvania, Texas, Virginia, and Wisconsin Employment Services

Analysis and Report

by

Western Test Development Field Center
Salt Lake City, Utah

U. S. DEPARTMENT OF LABOR

Employment and Training Administration
United States Employment Service

1982

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GATB Study No. 3013

DEVELOPMENT OF USES SPECIFIC APTITUDE TEST BATTERY

for

CUSTOMER-SERVICE REPRESENTATIVE (light, heat & power; tel. and tel; waterworks) 239.367-010

S-474R82

RESEARCH SUMMARY

This report is designed to provide the information required to evaluate the Specific Aptitude Test Battery (SATB) for Customer-Service Representative from three points of view: (1) technical adequacy of the research; (2) fairness to minorities; and (3) usefulness of the battery to Employment Service staff and employers in selecting individuals for training in Customer-Service Representative positions.

Research demonstrated a statistically significant and useful relationship between proficiency as a Customer-Service Representative and the following Specific Aptitude Test Battery:

Aptitudes	Cutting Scores
N - Numerical Aptitude	95
Q - Clerical Perception	105

The validation sample, on which the SATB was developed, consisted of 404 employed workers from 15 states and the District of Columbia. Analysts collected data for 126 subjects during the period of 1971-1975. Data for an additional 278 subjects were collected from 1977-1980. Statistical evidence justified combining the two groups into one aggregate sample. The black subgroup for the total sample consisted of 81 subjects. The tests used were those of the General Aptitude Test Battery (GATB). Job proficiency was measured by supervisory ratings.

Test research analysts found no evidence of difference in validity between blacks and nonminorities; the battery proved to be fair to blacks and nonminorities using several definitions of fairness. Additional information is presented in the Validity of the Battery section and in Appendix 1. The difference in validity between males and females was not statistically significant.

The SATB can be expected to produce a useful increase in the proportion of highly proficient workers. When the SATB was applied to the validation sample, composed of individuals who were employed and therefore considered competent, an increase from 67% to 75% in the proportion of highly proficient workers was found. A greater increase can be expected when the battery is used with applicants, because the range of relevant abilities is wider among applicants than among employed workers.

PROCEDURE

A concurrent design was used for the validation study; test and criterion data were collected at about the same time at each of the separate employment sites over a period from 1971 to 1980.

Job Analysis

A job analysis was done by observing the workers' performance on the job and by consulting with supervisors. Analysts prepared a job description based on the job analysis. This description was used to select an experimental sample of employed Customer-Service Representatives and to choose an appropriate criterion or measure of job performance.

Job duties of workers at each location listed in ACKNOWLEDGMENT were compared with the job description and found to be essentially the same. If minor differences were found, the job description was modified. The job description shown in Appendix 3 is the result of this process and may be used to provide information on the applicability of the test battery resulting from this research.

Each job duty was rated for frequency of performance, percentage of time spent, and level of difficulty. Critical job duties were identified on the basis of these ratings.

At least one analyst at each location rated the aptitudes as irrelevant, important, or critical to performance of the job duties at that location. A synthesis of these ratings and their rationale follows:

G - General Learning Ability	Required to understand communications from customers; to integrate information; and to make judgments as to type of action required to provide appropriate service.
V - Verbal Aptitude	Required to communicate with customers in person, by telephone, or correspondence for service, installation, discontinuance, problem situations, and customer accounts.
Q - Clerical Perception	Required to retrieve and monitor data within strict tolerances; to copy data from record to record; to fill out forms; and to detect errors in statements.
K - Motor Coordination	Required to operate keyboard while watching a computer terminal screen.

Experimental Test Battery

The experimental test battery for the validation sample consisted of all 12 tests of the GATB, B-1002B. Information on the composition and developmental research of the GATB may be found in the Manual for the General Aptitude Test Battery, Section III, Development, available from the Government Printing Office.

Validation Sample Description

The validation sample consisted of 404 Customer-Service Representatives (355 females and 49 males) employed at various locations in the North, South, and West (See ACKNOWLEDGMENT). A total of 105 were minority group members (81 blacks, 18 Hispanics, 2 American Indians, 2 Orientals, and 2 other nonminorities) and 299 were nonminority group members.

The means and standard deviations for age, education, and experience of sample members are shown in Table 1.

Some sample members were test-selected with the Purdue Clerical Adaptability Test prior to selection. Although no employer required formal education beyond high school graduation, substantial attainment beyond high school was not uncommon in the nationwide sample. All workers had at least 6 month's experience on a job which has duties similar to those found in the job description in Appendix 3. Descriptive statistics for black and nonminority subgroups are shown in Appendix 1.

Criterion for Validation Study

The criterion for the validation sample consisted of supervisory ratings. Each subject was rated twice by a first line supervisor with an interval of two weeks between ratings, or once each by a first and second line supervisor. Since sample members' aptitude scores are confidential, supervisors had no knowledge of test scores of workers. Thus, the possibility of these scores affecting ratings did not exist.

A modified descriptive rating scale was used for 278 of the sample members. The scale (see Appendix 2) consists of 11 items. Ten of these items cover different aspects of job performance. The 11th is a global item on the "all-around" ability of a Customer-Service Representative. Each item has five alternative responses corresponding to different degrees of job proficiency. For the purpose of scoring items, weights of 1 to 5 were assigned to the responses. The total score on the rating scale is the sum of the weights for the eleven items. The possible range for each rating is 11-55. The remaining 126 subjects were rated with the standard descriptive rating scale. Items A through E and K of the modified scale constitute all items of the standard scale.

Through analyzing separate statistics produced by the subjects associated with each rating scale, researchers concluded that the two different scales produced no difference in relative performance of subjects. Therefore, criterion scores of all subjects were standardized to equate in magnitude with those of the 11-item modified descriptive rating scale. A review of the job description indicated that the items included in both scales were directly related to important aspects of job performance.

A - Quantity of work: A Customer-Service Representative must provide service to as many customers as possible in order to maintain good customer relations and be a profitable resource to the company he or she represents.

B - Quality of work: The work of a Customer-Service Representative must be of high quality to insure that customers are given as correct and complete information as possible and that information needed to install, change or discontinue service is recorded correctly.

C - Accuracy of work: A Customer-Service Representative must be able to quote correct rates and review all written forms for accuracy and completeness.

D - Job knowledge: A Customer-Service Representative must possess comprehensive knowledge of service available and rating structures to answer all questions received by telephone or in person and to receive and record orders for installation and discontinuance or change in service.

E - Job versatility: A Customer-Service Representative must be capable of performing a variety of duties to give the best possible service to customers.

F - Knowledge of policies and procedures: A Customer-Service Representative must have knowledge of established policies and procedures supporting company policy.

G - Knowledge of rate structure: A Customer-Service Representative must have a clear understanding of the company rate structure by type of service.

H - Obtaining information: A Customer-Service Representative must have the ability to elicit all necessary information from customers.

I - Working amidst distracting conditions: Although this is an environmental condition not explicitly stated in the Job Description, the majority of supervisors indicated that being able to function amidst distracting conditions was one trait that separated good Customer-Service Representatives from mediocre or poor Customer-Service Representatives.

J - Efficient handling of inquiries: A Customer-Service Representative must have the ability to handle inquiries in person or by telephone with decisiveness and efficiency.

K - Workers all-around job ability: A Customer-Service Representative's value to the employer involves a combination of the aspects of job performance listed above.

A reliability coefficient of .84 was obtained between initial and follow-up ratings for the 278 subjects whose performance was measured by the modified scale. The relationship between initial and follow-up ratings for the 126 subjects rated by the standard descriptive rating scale was .84. Therefore, the final job performance criterion consists of standardized combined (sum of initial and follow-up ratings) scores, using as a base, the distribution of the combined scores of the 278 subjects. The possible range for the combined scores is 22-110. The actual range for the total sample is 33-110. The mean is 77.3 with a standard deviation of 15.7. Table 1 shows the relationship between the standardized job performance criterion and age, education and experience.

TABLE 1

Means, Standard Deviations (SD), and Pearson Product-Moment Correlations with the Criterion (r) for Age, Education and Experience

Validation Sample
N=404

	Mean	SD	r
Age (years)	30.4	10.2	.05
Education (years)	12.8	1.4	-.03
Total Experience (months)	57.0	69.0	.22**

**Significant at the .01 level

For the purpose of analysis, researchers dichotomized the criterion distribution so as to include, as nearly as possible, one-third of the subjects in the low criterion group and two-thirds in the high criterion group. This procedure is the standard for SATB studies. A criterion cutting score of 68 placed 33% of the overall sample in the low criterion group and 67% in the high criterion group.

ANALYSIS

The initial step in SATB data analysis is to identify those aptitudes which show some evidence of validity and job relatedness. This evidence can be:

1. Statistical evidence of the correlation (r) between the test and the criterion,

2. Content validity as evidenced by a rating of "critical" based on job analysis, or

3. Any combination of the following:

   - high mean

   - low standard deviation (SD)

   - rating of "important" based on the job analysis

   - demonstrated validity in a prior validation study.

Statistical results for the validation sample are shown in Table 2.

TABLE 2

Statistical Results for Validation Sample
N=404

Aptitude	Mean	SD	r
G - General Learning Ability	104.8	15.8	.24**
V - Verbal Aptitude	105.2	15.1	.18**
N - Numerical Aptitude	105.3	16.3	.30**
S - Spatial Aptitude	103.2	18.4	.11*
P - Form Perception	116.3	20.0	.19**
Q - Clerical Perception	123.1	15.6	.15**
K - Motor Coordination	115.9	15.8	.06
F - Finger Dexterity	101.4	21.5	.11*
M - Manual Dexterity	105.4	22.1	.12*

*Significant at the .05 level.
**Significant at the .01 level.

Table 3 summarizes the qualitative analysis and statistical results shown in Table 2 and shows the aptitudes considered for inclusion in the SATB.

TABLE 3

Summary of Qualitative and Quantitative Data
for Validation Sample

Type of Evidence	Aptitudes								
	G	V	N	S	P	Q	K	F	M
Job Analysis Ratings									
Critical									
Important	X	X				X	X		
Irrelevant									
Statistical Evidence									
High Mean					X	X	X		
Low SD									
Significant r	X	X	X	X	X	X		X	X
Aptitudes Considered for Inclusion in the Battery	G	V	N	S	P	Q	K	F	M

The information in Table 3 indicates that all nine aptitudes should be considered for inclusion in the battery: G, V, N, S, P, Q, K, F, and M. The objective is to develop a battery of 2, 3, or 4 aptitudes with cutting scores at the point (a) where about the same percent will meet the cutting scores as the percent rated in the high criterion group, and (b) which will maximize the relationship between the battery and the criterion.

The cutting scores are set at about one standard deviation below the mean aptitude scores of the sample, with deviations at five point intervals above and below these points to achieve the objectives stated above.

The following battery resulted:

Aptitudes	Cutting Scores
N - Numerical Aptitude	95
Q - Clerical Perception	105

Although standard qualitative analyses did not reflect aptitude N as either "critical" or "important," statistical evidence shows this aptitude to be important to the job. A review of the job description (Appendix 3) shows that this aptitude is not contraindicated.

VALIDITY OF THE BATTERY

This section of the report first presents evidence of criterion-related validity of the SATB on the validation sample and all relevant subsamples. Next, it provides information on effectiveness and fairness of test norms.

Criterion Related Validity

Table 4 shows that there is a significant relationship between the job performance criterion and the SATB for the validation sample in aggregate and each of its identifiable ethnic subgroups.

TABLE

Validity of Battery

Sample	N	High Criterion Group		Low Criterion Group		Chi Square	Significance Level P/2<	Phi Coefficient
		Below Cutting Scores	Meeting Cutting Scores	Below Cutting Scores	Meeting Cutting Scores			
Total	404	61	210	64	69	27.4	.0001	.26
Black	81	17	27	24	13	5.5	.01	.26
Non-Minority	299	39	175	35	50	17.2	.0001	.24

As a further test of battery validity, analysts computed a multiple correlation coefficient for the total validation sample. An R of .30 (significan, at the .005 level) was obtained between the job performance criterion and Aptitudes N and Q.

Effectiveness of the Battery

The level of validity shown in Table 4 indicates that the SATB will be useful in selection. In the total validation sample 67% were considered to be highly proficient. Of those who met the cutting scores, 75% were judged to be highly proficient. These findings are shown in Table 5.

TABLE 5

Effectiveness of the Battery

Selection System	Number Selected	Highly Proficient (High Criterion Group)		Marginal (Low Criterion Group)	
		N	% of Total	N	% of Total
Validation Sample					
Without Tests	404	271	67	133	.33
With Tests	279	210	75	69	.25

The research sample consisted of employed workers on whom some selection had already taken place; presumably those workers who lacked the required abilities had quit, been terminated, or had been transferred. Therefore, a greater increase over existing selection methods in the proportion of highly proficient workers selected is to be expected when the battery is used for selection, because the range of relevant abilities is greater among applicants than among employed workers.

Subgroup Analysis

No difference in the validities for blacks and nonminorities was found for this battery; the difference between the phi coefficients for blacks and nonminorities is not statistically significant (CR=.18).

The battery is fair to blacks since the proportion of both blacks and nonminorities that met the cutting scores approximated the proportion who were in the high criterion group; 49% of the blacks met the cutting scores and 54% were in the high criterion group; 75% of the nonminorities met the cutting scores and 72% were in the high criterion group.

The validity of the battery for the subgroup of 49 males was low. However, the difference between the phi coefficients for the male and female subgroups is not statistically significant (CR = 1.72).

APPENDIX 1

Descriptive Statistics for Black and Nonminority Subgroups of Validation Sample

	Black (N=81)			Nonminority (N=299)		
Variable	Mean	SD	Range	Mean	SD	Range
Aptitude G	94.1	14.0	69-132	108.1	14.9	66-149
Aptitude V	97.7	12.6	70-133	107.5	15.2	65-160
Aptitude N	96.0	14.4	53-132	108.3	15.8	54-148
Aptitude S	92.7	16.1	65-130	106.2	18.0	65-163
Aptitude P	109.2	19.6	71-157	118.1	19.6	46-167
Aptitude Q	119.4	15.5	86-152	123.9	15.4	88-181
Aptitude K	118.4	17.1	78-163	114.6	15.4	64-163
Aptitude F	98.0	17.3	54-137	102.1	22.6	45-158
Aptitude M	104.5	21.4	43-154	105.4	22.6	37-166
Criterion	73.5	14.7	35-110	79.0	15.6	33-110
Age	27.9	7.0	18- 56	31.4	10.9	18- 69
Education	12.8	1.2	12- 17	12.8	1.5	8- 19
Total Experience (months)	40.8	33.6	6-156	61.8	76.1	6-490

U.S. DEPARTMENT OF LABOR • MANPOWER ADMINISTRATION

DESCRIPTIVE RATING SCALE

SCORE _____

RATING SCALE FOR _____

D.O.T. Title and Code

Directions: Please read the "Suggestions to Raters" and then fill in the items which follow. In making your ratings, only one box should be checked for each question.

SUGGESTIONS TO RATERS

We are asking you to rate the job performance of the people who work for you. These ratings will serve as a "yardstick" against which we can compare the test scores in this study. The ratings must give a true picture of each worker or this study will have very little value. You should try to give the most accurate ratings possible for each worker.

These ratings are strictly confidential and won't affect your workers in any way. Neither the ratings nor test scores of any workers will be shown to anybody in your company. We are interested only in "testing the tests." Ratings are needed only for those workers who are in the test study.

Workers who have not completed their training period, or who have not been on the job or under your supervision long enough for you to know how well they can perform this work should not be rated. Please inform the test technician about this if you are asked to rate any such workers.

Complete the last question only if the worker is no longer on the job.

In making ratings, don't let general impressions or some outstanding trait affect your judgment. Try to forget your personal feelings about the worker. Rate only on the work performed. Here are some more points which might help you:

1. Please read all directions and the rating scale thoroughly before rating.

2. For each question compare your workers with "workers-in-general" in this job. That is, compare your workers with other workers on this job that you have known. This is very important in small plants where there are only a few workers. We want the ratings to be based on the same standard in all the plants.

3. A suggested method is to rate all workers on one question at a time. The questions ask about different abilities of the workers. A worker may be good in one ability and poor in another: for example, a very slow worker may be accurate. So rate all workers on the first question, then rate all workers on the second question, and so on.

4. Practice and experience usually improve a worker's skill. However, one worker with six months' experience may be a better worker than another with six years' experience. Don't rate one worker as poorer than another merely because of a lesser amount of experience.

5. Rate the workers according to the work they have done over a period of several weeks or months. Don't rate just on the basis of one "good" day, or one "bad" day or some single incident. Think in terms of each worker's usual or typical performance.

6. Rate only the abilities listed on the rating sheet. Do not let factors such as cooperativeness, ability to get along with others, promptness and honesty influence your ratings. Although these aspects of a worker are important, they are of no value for this study as a "yardstick" against which to compare aptitude test scores.

MA 7-66
Apr. 1973

NAME OF WORKER (Print) (Last) (First)

SEX: MALE_____ FEMALE_____

Company Job Title: _____

How often do you see this worker in a work situation?

- ☐ All the time.
- ☐ Several times a day.
- ☐ Several times a week.
- ☐ Seldom.

How long have you worked with this worker?

- ☐ Under one month.
- ☐ One to two months.
- ☐ Three to five months.
- ☐ Six months or more.

A. How much can this worker get done? (Worker's ability to make efficient use of time and to work at high speed.) (If it is possible to rate only the quantity of work which a person can do on this job as adequate or inadequate, use #2 to indicate "inadequate" and #4 to indicate "adequate.")

- ☐ 1. Capable of very low work output. Can perform only at an unsatisfactory pace.
- ☐ 2. Capable of low work output. Can perform at a slow pace.
- ☐ 3. Capable of fair work output. Can perform at an acceptable pace.
- ☐ 4. Capable of high work output. Can perform at a fast pace.
- ☐ 5. Capable of very high work output. Can perform at an unusually fast pace.

B. How good is the quality of work? (Worker's ability to do high-grade work which meets quality standards.)

- ☐ 1. Performance is inferior and almost never meets minimum quality standards.
- ☐ 2. Performance is usually acceptable but somewhat inferior in quality.
- ☐ 3. Performance is acceptable but usually not superior in quality.
- ☐ 4. Performance is usually superior in quality.
- ☐ 5. Performance is almost always of the highest quality.

C. How accurate is the work? (Worker's ability to avoid making mistakes.)

- ☐ 1. Makes very many mistakes. Work needs constant checking.
- ☐ 2. Makes frequent mistakes. Work needs more checking than is desirable.
- ☐ 3. Makes mistakes occasionally. Work needs only normal checking.
- ☐ 4. Makes few mistakes. Work seldom needs checking.
- ☐ 5. Rarely makes a mistake. Work almost never needs checking.

D. How much does the worker know about the job? (Worker's understanding of the principles, equipment, materials and methods that have to do directly or indirectly with the work.)

- ☐ 1. Has very limited knowledge. Does not know enough to do the job adequately.
- ☐ 2. Has little knowledge. Knows enough to get by.
- ☐ 3. Has moderate amount of knowledge. Knows enough to do fair work.
- ☐ 4. Has broad knowledge. Knows enough to do good work.
- ☐ 5. Has complete knowledge. Knows the job thoroughly.

E. How large a variety of job duties can the worker perform efficiently? (Worker's ability to handle several different operations.)

- ☐ 1. Cannot perform different operations adequately.
- ☐ 2. Can perform a limited number of different operations efficiently.
- ☐ 3. Can perform several different operations with reasonable efficiency.
- ☐ 4. Can perform many different operations efficiently.
- ☐ 5. Can perform an unusually large variety of different operations efficiently.

F. Considering all the factors already rated, and only these factors, how good is this worker? (Worker's all-around ability to do the job.)

- ☐ 1. Performance usually not acceptable.
- ☐ 2. Performance somewhat inferior.
- ☐ 3. A fairly proficient worker.
- ☐ 4. Performance usually superior.
- ☐ 5. An unusually competent worker.

Complete the following ONLY if the worker is no longer on the job.

G. What do you think is the reason this person left the job? (It is not necessary to show the official reason if you feel that there is another reason, as this form will not be shown to anybody in the company.)

- ☐ 1. Fired because of inability to do the job.
- ☐ 2. Quit, and I feel that it was because of difficulty doing the job.
- ☐ 3. Fired or laid off for reasons other than ability to do the job (i.e., absenteeism, reduction in force).
- ☐ 4. Quit, and I feel the reason for quitting was not related to ability to do the job.
- ☐ 5. Quit or was promoted or reassigned because the worker had learned the job well and wanted to advance.

RATED BY	TITLE	DATE
COMPANY OR ORGANIZATION	LOCATION (City, State, ZIP Code)	

GPO 883-716

MA 7-66
Apr. 1973

S-474R82

APPENDIX 3

JOB DESCRIPTION

Job Title

CUSTOMER-SERVICE REPRESENTATIVE (light, heat & power; tel. and tel.; waterworks) 239.367-010

Guide for Occupational Exploration (GOE) 07.04.01; Interviewing.

Job Summary

Talks with customers by phone or in person to receive orders for installation, discontinuance, or change in water, gas, electric, or telephone services.

Work Performed

*Talks with customers by phone or in person to receive orders for installation, discontinuance, or change in services: Quotes costs and rates for various services. Questions customers to obtain information required to initiate installation or discontinuance of services. Writes obtained information on form designated for specific order given by customer. Reviews written form for accuracy and completeness. Routes forms to proper person or department for implementation of orders.

*Questions customers to obtain information on changes in billing address: Corrects company records according to office procedure. Corrects customer records by writing address change on record or typing change on computer terminal keyboard.

May investigate and resolve customer complaints regarding billing or service rendered. Refers unresolved complaints to Customer Representative.

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*These job duties were designated as critical job duties because they must be performed competently if the job is to be performed in a satisfactory manner. Customer-Service Representatives spend about 80% of their working time performing these duties.